

## CONFIDENTIAL CLIENT DATA SHEET

Catholic Charities of Eastern Oklahoma  
c/o The Advancement Group, Inc.  
9175 South Yale Avenue, Suite 200  
Tulsa, Oklahoma 74137

(918) 491-0079 Office  
(918) 491-0087 Fax

DATE \_\_\_\_\_ REFERRED BY \_\_\_\_\_

### I. PERSONAL and FAMILY INFORMATION:

NAME \_\_\_\_\_ BIRTHDATE \_\_\_\_\_  
Full Legal Name - Please Print

SPOUSE \_\_\_\_\_ BIRTHDATE \_\_\_\_\_  
Full Legal Name - Please Print

HOME ADDRESS \_\_\_\_\_

CITY \_\_\_\_\_ STATE \_\_\_\_\_ ZIP \_\_\_\_\_

EMAIL \_\_\_\_\_

COUNTY OF RESIDENCE \_\_\_\_\_ HOME PHONE ( \_\_\_\_ ) \_\_\_\_\_

OCCUPATION - YOU \_\_\_\_\_ WORK PHONE ( \_\_\_\_ ) \_\_\_\_\_

OCCUPATION - SPOUSE \_\_\_\_\_ WORK PHONE ( \_\_\_\_ ) \_\_\_\_\_

SOCIAL SECURITY NO. YOU \_\_\_\_\_ SPOUSE \_\_\_\_\_

MARITAL STATUS: \_\_\_ MARRIED \_\_\_ SINGLE \_\_\_ WIDOW(ER) \_\_\_ DIVORCED

UNITED STATES CITIZEN: YOU: \_\_\_ YES \_\_\_ NO SPOUSE: \_\_\_ YES \_\_\_ NO

### II. SERVICES DESIRED:

\_\_\_ ESTATE PLANNING \_\_\_ FINANCIAL PLANNING \_\_\_ RETIREMENT PLANNING

\_\_\_ BUSINESS PLANNING \_\_\_ INSURANCE PLANNING \_\_\_ OTHER

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_